A CAD process builds the CAD product (a total T&D curriculum or product line) with individual parts (T&D Modules and T&D Events) that add up to a logical whole within the context of a given job or category of position.

A CAD ensures that all T&D works together to produce the desired results by providing employees with all the knowledge/skills needed to perform.

CAD is not what is sometimes referred to as curriculum design, which I read as course design, or even small numbers of courses design. CAD is typically done for complex jobs, job families, major departments/functions, or even whole divisions and whole companies (one manageable bite at a time).

A CAD can even focus on a major business process (Continued on page 4)
**Past PACT Projects...**

**NS 1251: Product Management Process Training**  
by Guy W. Wallace

NS 1251: Product Management Process Training was an eight-day, keystone course in the overall Curriculum Architecture Design (CAD) of more than 120 potential training events. Eleven hundred product managers from five business units were in the target audience.

We built the course in the summer and fall of 1986. This project won an ISPI Award of Excellence for Best Instructional Product in 1989 for Gerry Kaufhold, our client, and me, for both its instructional design and its results achieved.

The ROI was greater than 400 percent for our client, and we had added high-end estimates for all of the costs we could think of to the “I,” because the “R” figure was turning out to be so high!

It all began in 1986 at the taxicab stop at the San Francisco airport immediately following the ISPI (then NSPI) conference. We bumped into one of the key training managers of AT&T Network Systems who had a project on which he wanted us to bid.

The customer liked the engineering approach of our CAD methodology, and we ended up with the contract to first conduct a CAD project and then build many of the courses within that CAD.

NS’s need to develop its product managers was a residual result of the 1984 modified final judgment (MFJ), Judge Greene’s plan after the U.S. Justice Department’s antitrust action to break up the monopoly of AT&T succeeded. AT&T would no longer own its primary customers.

The eight-day NS 1251: Product Management Process Training course was the keystone course in the entire curriculum architecture for the product managers responsible for decisions with hundred million dollar implications for a giant corporation. The stakes were high for the client. The needs of the diverse target audience were varied—hence, the highly modularized approach of the curriculum design.

NS 1251 taught and provided ample practice opportunities for both seasoned and rookie product managers regarding the basics of business case development, product life cycle management, financial forecasting and monitoring, cross-functional team leadership, and a varied set of interpersonal skills.

(Continued on page 7)

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**Performance Tests for Qualification/ Certification Systems and Pay for Performance Systems**  
by Kelly A. Rennels

**Introduction**

I’m not an engineer, or even a skilled technician; however, I have developed many Performance Tests for some very technical jobs.

A Performance Test is a tool/instrument used to measure an individual’s capability for performing a specific task or piece of work. It is not a knowledge test or a test of an enabling skill. For example, you might test the actual performance for “sending or receiving an e-mail” in a Performance Test, but writing the steps for sending an e-mail, logging on to a computer, etc. is not a Performance Test.

The key principles are that Performance Tests

- Test tasks directly relevant to job performance.
- Test end performance and assume if you can perform the task within the defined measures, then you must know the enabling knowledge and skills.

Some Performance Test applications are

- Qualification/ certification systems
- Selection systems
- Pre/ posttests for training
- Pay for performance systems

(Continued on page 9)
On September 17, I hosted a table at CISPI’s (Chicago’s chapter of ISPI) annual Crackerbarrel event. For those of you that do not already know, a Crackerbarrel is about the best presentation gig you can get—you only have to fill 20 minutes or so (and since you want lots of group input, only about 5 or 10 minutes is you talking).

Also, CISPI offers wine, cheese, and other refreshments in between the sessions (and during, if you can pull it off). The way it works is that people choose one of approximately 12 tables and sit down for a semistructured discussion. At the conclusion of the 25-minute session, there is a 10-minute break and everyone goes to another table. This repeats three times. So another benefit is that you get a couple of practice runs as well.

At my table, we discussed how to determine the value of a performance opportunity. Using a simple model I developed and presented with Dottie Soelke during last year’s ISPI conference, a sample training request is processed to derive an initial cost/benefit assessment from the standpoint of intended impact on business performance. The process can be used as a way to roughly gauge a project concept, or it can be used with more precision as a way to walk a Steering Team through a project scoping process, and it can be applied rigorously to set actual goals/targets for a project.

The idea is straightforward and so is the process. There are a couple of key insights needed to make it work.

1. Define the project
2. Estimate/quantify the return or value of the project
3. Conceptualize a solution
4. Estimate the cost of the solution
5. Assess the risk
6. Calculate the return on investment
7. Decide “go/no-go” or to re-evaluate the assumptions

When you are defining the project, you have to do it with the customer. The idea is to work together so that you have agreement on the performance in question (i.e., what people are doing versus what you want them to do), the audience in question, business rationale/results to be impacted, and any and all expectations (details like deliverables, due date, roles). Of course you can and should negotiate this agreement, but too often it isn’t even clarified and written down!

The bottom line is that to really assess results, you need a defined project. Otherwise, you don’t know where to start and where to stop tracking results.

The next key concept is the idea of a performance opportunity and how it can be quantified. If you start with a bias toward performance-based training, you can buy the assumption that the ultimate goal of the training is to change some work performance. That means that after training, people will be able to either do more work, do work more cheaply, or do better work. These improvements eventually find their way into more sales, reductions in scrap/waste, savings in time, etc., all of which can be assigned a value to the business.

What about “enabling K/S”? Things like teamwork skills are important, but how do you quantify the value? It is common sense—you don’t. That is, you don’t try to establish a hard value. Instead, you have to accept soft values or include the teamwork skills within an overall set of interventions targeted at an overall result. The determining factor is the person who is funding the project. You need a rationale that they will accept.

If you are only working on an enabler, you will have to deal with more subjective measures.

Risk is a critical element of every project—nothing ever goes exactly according to plan. And, most of us know where the plan is weak if we make the attempt to look. However, it is critical that you and your customer have a dialogue about risk so that nobody has false expectations about the project.

There is no magic to assessing risk once it has been identified. Throughout this entire process, you have been making assumptions. These assumptions included things like the size of the target audience, the length of time it will take to implement the process can be used as a way to roughly gauge a project concept, or it can be used with more precision as a way to walk a Steering Team through a project scoping process.
The PACT Processes enable visible/predictable ISD: lean-instructional systems design/development.

The PACT Processes are lean because they shorten cycle times, reduce incurred expenses, and improve the quality of the outputs. The PACT Processes are lean due to their use of teams, templates, tools, and a defined ISD process. PACT provides a common process—a common approach for the conduct of ISD by T&D professionals.
It sometimes concerns ISD professionals that instructional integrity will fall by the wayside if the customer has too much say in ISD efforts. After all, they always want ten pounds of training shoved into a five-pound bag and the T&D suffers, as do the learners who get high-level overviews instead of hands-on, skills-building T&D, due to the time or methods constraints imposed by unreasonable customers!

Our PACT Process approach is to facilitate quickly, in a somewhat Socratic fashion, the customers/stakeholders through a series of logical data gathering, analysis, design, and decision-making steps so that they will make better business decisions throughout the process and, more importantly, make those decisions at the right time. They live with the consequences of bad T&D more than the T&D organization does. Sure, we in ISD get beat up if the T&D is bad, but their organizational performance suffers.

The key teams and roles involved in the PACT Process for CAD include the following:

♦ PST – Project Steering Team
♦ PM – Project Manager (supply side/customer side)
♦ AT – Analysis Team
♦ DT – Design Team
♦ IPT – Implementation Planning Team
♦ ISDT – ISD Team

The Project Steering Team (PST) is critical in that the PST members handpick both the Analysis Team and Design Team members for their mastery of performance and their credibility with both the PST and the target audience they will represent.

A CAD generates hundreds of data points and is tough for any individual to grasp in a short time frame. The PST will be asked to sanction the plan, the data, and the design at several points, but it may be difficult for them to do so quickly. PST members are typically upper- and midlevel managers who are too busy to backtrack through all of the data to ensure it’s the right stuff. Their selection of master performers and other subject matter experts builds quality in from the get-go! This approach of creating trust between the PST and the key teams of customer/stakeholder staff involved in the CAD effort helps to build quality in the first place, rather than attempting to inspect it in later. It also facilitates management’s need for command and control, while still empowering and supporting business investments, such as T&D.

The actual work of designing a Curriculum Architecture is best conducted by an instructional designer, a member of the ISD or T&D organization. They are guided and influenced through the design process by a CAD Design Team, all of whom should have been involved in the CAD analysis process as Analysis Team members.

**CAD Project Cycle Times**

CAD projects may typically span a two- to four-month cycle. But as always, it depends!

The table below is an attempt to provide you with a reasonable estimate. But in truth, you need to determine the exact tasks for each CAD phase and come up with a cycle time and cost estimate for the specific project.

A small CAD project is one where the target audience is a singular job title, typically located in one location or where the performance is pretty standard from one location to the next, and where the customer and key stakeholders are easy to contact and schedule.

A medium CAD project is one where multiple jobs may be targeted and where the PST members and Analysis Team/Design Team members might be in multiple locations.

A large CAD project is one where the target audiences are more varied, the performance varies greatly between the multiple locations, etc. And, of course, there are even larger CAD projects. Some of the ones I conducted were

<table>
<thead>
<tr>
<th>CAD Phase</th>
<th>Phase 1 Cycle Time</th>
<th>Phase 2 Cycle Time</th>
<th>Phase 3 Cycle Time</th>
<th>Phase 4 Cycle Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small CAD Project</td>
<td>1 week</td>
<td>2 weeks</td>
<td>2 weeks</td>
<td>1–2 weeks</td>
</tr>
<tr>
<td>Medium CAD Project</td>
<td>2 weeks</td>
<td>2–3 weeks</td>
<td>2–3 weeks</td>
<td>2 weeks</td>
</tr>
<tr>
<td>Large CAD Project</td>
<td>3 weeks</td>
<td>3–4 weeks</td>
<td>3–4 weeks</td>
<td>2–3 weeks</td>
</tr>
</tbody>
</table>
A CAD project always leads to multiple MCD projects. MCD projects are actually prioritized in Phase 4 of the CAD project to build T&D to meet key business priorities of the company so that you only develop the T&D that should be out of all of the T&D that could be.

Many potential T&D products are never built because the return on investment (ROI) and economic value added (EVA) forecasts or the strategic value to the enterprise simply do not warrant the efforts and expenditures given the returns.

CAD Benefits
Quality, performance-based T&D exists exclusively to improve human performance, and that human performance exists within the context of business or organizational processes. Any other goal for T&D has almost zero ROI.

The CAD’s architectural design will help reduce the

CAD projects may typically span a two- to four-month cycle. But as always, it depends!

A CAD project always leads to multiple MCD projects. MCD projects are prioritized in Phase 4 of a CAD project to build T&D to meet key business priorities—the T&D that should be out of all the T&D that could be.
The interpersonal skills included time management, active listening, and verbal communications behaviors appropriate to the job of wrangling with the representatives of many different organizations, each with different agendas and opinions on what to do and how and when to do it, and who exactly will do it.

All of this was accomplished during the eight days through a series of lectures and participation in five phases of an ever-expanding/increasingly difficult simulation exercise focused on managing a product through its life cycle stages.

The NS 1251 simulation exercise taught product management via a focus on fictional business units responsible for a product line different from, but similar to, the real products of Network Systems. The Training focus was on process not content. NS 1251 participants were paired to manage five different video products through the typical issues associated with that phase of the life cycle, and then watched four other product management teams do the same on other products in the product family.

The class held 20 participants. Ten participants were put into two major teams, Alpha and Omega, who would run through the exercise in parallel. The class could also be run for any number of groups of ten, each requiring one facilitator.

For each of the five phases of the life cycle, the simulation exercise covered the five product rounds. In each product round, the five teams of two people each would be responsible as the product management team leaders (they were role-playing their jobs as product managers). They were leading a cross-functional team through data review, business strategy development and (high-level) operations planning, implementation plan schedule development, budgeting, and financial forecasting.

You would have experienced it all in the eight days. You would have co-conducted five meetings as the product manager and honed your agenda development/meeting facilitation/conflict resolution/financial calculating/business case and business plan development skills with five rounds of hands-on practice.
The Return on Your PACT Process Investment
(Continued from page 1)

Below are three ways T&D produced via the PACT Processes is different from much of the T&D that is found in organizations.

1. The T&D will be “performance-based”
2. The T&D will be modular
3. The T&D will be available to learners more quickly than if produced through traditional ISD methods

What does performance-based T&D mean to the training supplier, consumer, or business manager?

Performance-based training goes beyond enabling knowledge and skills and actually teaches people how to perform their jobs. As a result, the new learning is more likely to transfer to the job. Training suppliers invest their energies (and budget) in projects that will make a difference.

T&D customers (trainees and their managers) select training from a path sequenced to fit their job requirements based on their “need to use.” The training experience won’t be a waste of time (as in “if I get just one good idea it was worth sitting there for three days”) but, instead, is seen as relevant and necessary to success.

PACT Processes on the Road
(Continued from page 3)

intervention, and the anticipated performance improvements. For each, ask yourself how likely it is that the actual results will vary and how serious the consequences will be. Focus on those that are high likelihood first and, within that group, those that have highly serious consequences.

Once the issues are identified, it is okay (especially at the beginning of the project) to then simply assign a risk factor to the whole project. Just use a percentage, as in “There is an 80 percent chance that we will execute the plan and gain the expected results.” Multiply the planned return by the risk percentage to find a reasonable or believable return. Use this number to evaluate the overall opportunity.

And the business manager? This stakeholder plays a key role across the entire spectrum of T&D decisions. They identify which performance needs attention, handpick top performers to provide input to the project, and prioritize the training solutions that get developed based on current (and projected) business needs. They are paid to be responsible for business results. The PACT Processes allow them to make training decisions from a business perspective. If you are a stockholder, this is exactly the way you want these decisions made.

What does modular T&D mean to the training supplier, consumer, or business manager?

Modular T&D means potential reuse. Of course, you sometimes reuse entire T&D products (i.e., events/courses). However, a modular architecture greatly increases the number of opportunities for shareability because, while an entire course may not fit another audience’s needs, there is a much greater likelihood that parts of it will.

As a training supplier, modular T&D means cost reductions because every module that is reused is a module that you didn’t pay full price to develop. Your people are focused on filling “gap” training, not re-creating something that already exists. Your resources can stretch further.

(Continued on page 9)

Performance-based training goes beyond enabling knowledge and skills and actually teaches people how to perform their jobs.

Does the project still make sense if the return is cut by 20 percent?

If not, you may need to look at the overall plan and decide where to make changes. Or, you decide “no-go.”

Most of this is common sense, but real projects can seem much more complex. And they are. However, you can work through a rational process if you are focused, patient, and have a simple tool. You can pick up the tool from our Web site (CADDI.com). The focus and patience are up to you.
The Return on Your PACT Process Investment

(Continued from page 8)

As a learner, modules are transparent to you during the training. However, you benefit because you are getting a common message. We should also hope that the T&D supplier has been able to take advantage of the opportunity that reuse provides by “continuously improving” the design to make it as effective as possible.

Business people don’t have to be convinced of the value of reuse. This concept has been widely adopted in product design and software development, as well as other business practices. In fact, they are more likely to wonder why it isn’t already being routinely practiced in the training world.

What does a reduced “time to market” mean to the training supplier, consumer, or business manager?

As a training supplier, you probably get a large number of requests for training. Lean-ISD enables you to respond more quickly. PACT’s standard/common processes help everyone understand “the routine” of a project and complete it quickly. Also, the PACT Processes use group meetings for analysis and design to reduce the cycle time of these activities significantly (e.g., we once developed from scratch a four-day, group-paced, simulation-based training program for Labor Relations for new supervisors in a union environment in less than 90 days!).

As a learner or line manager, the benefits of faster training are obvious—you get the training you need sooner. The cost and aggravation of the learning curve are reduced for you, the business, and your customers.

As a shareholder, you would also be a supporter of cycle time reduction, because as in the manufacturing world, it yields all kinds of return. Reducing cycle time means reduced cost per unit because you use less subject matter expert time. And, you get more training for the same budget. Training is no different from other business functions—if you cut your cycle time in half, it effectively doubles your capacity!

The Bottom Line

The PACT Processes focus T&D on business priorities. They enable training suppliers to develop and deliver training at reduced costs. And they lead to increased customer satisfaction. The real bottom line, though, is that a key differentiation for many companies is human performance—that is, what your people can do. T&D can be a much more significant influence on human performance if the PACT Processes are part of how your T&D organization does business.

Performance Tests

(Continued from page 2)

My first project was to develop Performance Tests for pipeline operators and maintenance technicians working on the Alyeska Pipeline in Alaska in 1994. I worked with designated master performers to build more than 100 tests to assist the client in proving to their regulators that they had qualified people performing mission-critical tasks.

Currently I am working with Pete Hybert of CADDI to develop Performance Tests for systems engineers, design engineers, and system and service technicians for one of the leading providers of building control systems. The client is using these Performance Tests to help assess field technical and sales staff competence in an overall effort to accelerate performance capability of their mission-critical performances. This assessment will also allow them to better prioritize the development of the gap T&D of their Curriculum Architecture Design (CAD) projects. The CADs are being designed concurrently with the analysis and design of the Performance Tests.

In both cases, we used CADDI’s PACT Process for Instructional Activity Development (IAD) to define performance requirements and document that on our Performance Model. Then we derived the enabling knowledge and skills and created design specifications for each of the Performance Tests.

Client project gate reviews were conducted to prioritize the Performance Tests to be developed. Then we worked with master performers (MP) and subject matter experts (SME) individually to develop each Performance Test. The Performance Tests were then pilot tested with the target audience, revised as necessary, and released to the field for continued use.

(Continued on page 10)
Using CADDI’s PACT Process for IAD, we defined performance requirements and documented that on our Performance Model. Then we derived the enabling knowledge and skills, and created design specifications for each of the Performance Tests.

The business situation that drove this project was the company’s need to recruit and “spin up” new people quickly without risking their customer satisfaction rating.

Not only was the project itself quite interesting, but all the travel throughout Alaska allowed for some pretty interesting excursions, including hiking in Denali National Park, white water rafting, and, best of all, heli-skiing in the Chugach Mountains near Valdez!

My second Performance Test project is for a leading provider of integrated, distributed digital control systems used to manage heating, ventilation, air conditioning, fire and smoke, and access in commercial, industrial, healthcare, and educational facilities.

The purpose of the project is to produce an integrated development and qualification system for systems and service technicians, design engineers, project managers, project engineers and sales. The project used both CADDI’s CAD and IAD processes to produce the training and development design and the Performance Tests that qualified the employee.

The business situation that drove this project was the company’s need to recruit and “spin up” new people quickly without risking their customer satisfaction rating. The market for building controls systems is growing rapidly. But, to successfully take advantage of the opportunities, a great deal depends on the capability of field personnel to engineer, install, and service the system that has been customized to specific customer and facility requirements. The company was challenged with how to expand quickly to meet market demand.

The target audiences included the effort are six different technician roles, design engineers, project managers, project engineers, and sales roles at 70 branches in the U.S. and Canada.

After client project gate reviews were conducted, we developed each prioritized Performance Test with input from MPs and SMEs during individual interviews.

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**NS 1251**

You would have had to represent the issues of related/partner organizations as you and they role-played our parts in the exercise. It would have felt eerily familiar to anyone with a lot of real-world experience—at least that’s what they told us.

The last ten deliveries of NS 1251 included six in The Netherlands, which I delivered.

NS 1251 was a great learning experience for Pete and me. My greatest insights into business in general and financial management specifically were learned in this project. This T&D project led to many more for NS, where even more was learned about business planning, marketing, manufacturing, sales, finance, service, public relations, contracting, operations, various quality tools and techniques, and many, many other learnings!

We were fortunate to work on such a great series of projects. Our main client, Gerry Kaufhold, is an independent contractor and can be reached at geraldpkaufhold@worldnet.att.net.
“My experiences in developing more than 100 technical Performance Tests have proven the need for process control to ensure the product quality and manage the cycle time and costs for analysis, design, development, and pilot test. I fully support and believe in the CADDI philosophy: ‘The supplier owns the process, and the customers own the content.’”

**Performance Tests**

(Continued from page 10)

**Key Challenges**
A few challenges that were faced during these two projects have included:

♦ A decentralized organization structure and culture that made it challenging to design a common standardized system where common language, processes, paperwork, etc., do not exist

♦ Establishing standard measures/metrics for performing a task when there were no company standards in place

♦ Determining the performance steps to be used for the Performance Test where there is no company procedures in place and multiple “good” ways it could be done

♦ Keeping the training and qualification requirements evergreen, as results from the ongoing development and release of new products by the company

♦ Creating the supporting administration/ tracking system and processes that were simple and effective, user friendly, with minimum investment

**Summary**
My experiences in developing more than 100 technical Performance Tests have proven the need for process control to ensure the product quality and manage the cycle time and costs for analysis, design, development, and pilot test. I fully support and believe in the CADDI philosophy:

“The supplier owns the process, and the customers own the content!”

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**Next Issue, CADDI Crewmate profile:**

**Kelly A. Rennels**

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**Crewmate Profile: Pete Hybert**

(Continued from page 12)

Pete has applied his focus on performance in several published articles and presentations. He sees an opportunity to design integrated human support systems for new products and services in which training is only one piece of a seamless system providing knowledge, skills, and information to the work processes. Other areas of interest are straightforward ways of determining the value of various interventions and “visible management”—using charts/ scoreboards to show overall business system performance. A long-time ISPI member, Pete is currently serving as this year’s Awards of Excellence committee chair. Pete lives in Wheaton with his wife, Faith, and their sons, Ian (13) and Colin (9). Balancing work and travel with household and family responsibilities is always a challenge. “After almost 20 years of marriage, we are pretty well adjusted by now. We try to get all the routine stuff done during the week so Saturdays can be used for special projects. Sundays we try to make one hundred percent family time. (It sounds more organized than it feels, though.)”

Pete doesn’t really have time for hobbies, but he would like to find a way to “do music somehow. Right now, the priority is to get CADDI rolling, keep up with client work, maybe get a book written, and still work in some fun.” Always the optimist.

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**CADDI Summerfest**

Our first annual Summerfest was held on the waters of Lake Michigan and the Chicago River. “The Buccaneer” carried a lively (see photo!) group of crewmates, friends, and clients past Chicago’s skyline while we ate, drank, and talked.

Check out our Web site (www.CADDI.com) for more photos of the event.

Pictured at right is Olivia King, daughter of Mark King, Landis & Staefa client.
Pete Hybert, one of CADDI’s two founding partners, has been working in corporate training and development since 1984, when he joined Landis & Staefa’s (then MCC Powers) training organization in the northern suburbs of Chicago. Pete entered the industry just after graduating from Northern Illinois University with a master’s degree in education (emphasis in Instructional Systems Design). He previously worked at a number of jobs that could be best described as miscellaneous, after receiving a bachelor of music degree in composition.

But, learning music composition was actually not bad training for consulting—it follows a similar process. “You start with an idea of what you want to do, but you have to evolve it to fit the constraints of your situation—for example, your audience’s expectations, the capabilities of the instruments and instrumentalists, time frame available, etc. It’s just like building a training program, or even developing a product, for that matter.”

In college, Pete learned the usual instructional design theories and principles, but he was also introduced to a discipline called “performance technology” in a course built around Tom Gilbert’s landmark book Human Competence. What stuck with him? Gilbert’s focus on accomplishments and results versus tasks and behaviors. After all, tasks and processes are only means to desired ends.

With Landis & Staefa, Pete started as an intern to develop a couple of self-paced modules from a curriculum architecture designed by an R.A. Svenson & Associates consultant, Guy Wallace. Before the internship ended, the project lead left the company for a new job and Pete inherited the whole project! Pete had a number of good experiences there, including learning and applying Performance Modeling and Knowledge/Skills analysis to new product training, engineering training, and service. He learned about systems there as well, attending Geary Rummler’s system mapping workshop and trying to understand complex building environmental control system logic. Pete also designed his first modular curriculum architecture for the service side of the business.

In 1989, Pete joined SWI·Svenson & Wallace to work as a consultant. He focused on training projects, including Curriculum Architecture Design, custom course design, and simulation development. One key learning opportunity was in how business works. This came through a series of product management training projects addressing team leadership, market assessment and business case development, and ongoing life cycle management all centered around what later became popular as EVA—Economic Value Added. Other highlights included a large curriculum architecture for an entire business undergoing re-engineering, being in on the refinement of the CAD process, and starting on the ground floor of the MCD and IAD methodologies that have become the PACT Processes.

One of many PACT-related highlights was developing training to support a combinatorial chemistry process technology transfer. “The content was way over our heads, but yet the PACT Processes worked. We were able to facilitate a group of very independent scientists to ‘reduce to training’ a very complex technical process. We knew then that the PACT Processes reduced ‘ISD art’ to something much more like practice.”

When SWI decided to break into two businesses, Guy approached Pete to partner with him to create CADDI. Pete believed the PACT Processes were sound, marketable, and worth the effort it would take to get a new business off the ground. He also knew that the CADDI team, many of whom came from the former SWI, would be a high-performing work group—one that would “cook, crank, and wail.” He was also excited to be part of a business that would fully apply the principles of PT (and ISD)—CADDI would define performance expectations, provide visible measures, offer rewards and recognition, train people, i.e., everything a work team needs to perform (although, not all in the first six months).

(Continued on page 11)
"We have applied the CADDI process for several years in a variety of situations. The process has been valuable to our clients and has been a best practice and trademark for our training and development operation."
— Gretcha Flinn and Marlene Frederick, Eli Lilly and Company

“I began taking the training simultaneous with joining my new company. In retrospect, I firmly believe this was the best way for me to learn the processes and begin to use them in my role as Sr. Project Manager. The processes provide a solid architectural structure within which to lead my customers as we develop performance-based curricula. I’ve completed all training in the PACT Processes and have lead a team through the first three phases of a major MC (CAD) Process. I anticipate moving into one or more MI (MCD) processes to begin actual course development for the same project. All PACT Processes are detailed, flexible, and truly “self-healing.” If a key detail is overlooked, it will be captured using these processes. The structure allows for and supports creativity in identifying, addressing, and meeting customer needs while maintaining instructional integrity. I hope to see this model referenced in our graduate ISD programs!”
— Elaine Cook, Raytheon Training Company

“What was significant for me as a developer was having the project’s decision-makers involved up-front. That helped set direction early and minimized revisions later in the project. As a result, I found myself without much to do during the revision phase.”
— Mark Bade, Bade & Associates

“The AT&T Call Center project reminded me of the city and state maps on the Internet. In the design and development we were working at a ‘street level’ with lots of and precise content. But the beauty of the PACT is that we could literally ‘zoom out’ to a picture view of the entire project. This let us make critical decisions about to design the learning and to ensure that they included the right content that linked to what people actually needed to do on the job.

The design and development phase of the AT&T Call Center project was anchored in an upfront analysis that involved achieving a consensus on the content by subject matter experts and master performers. As a result, we were able to complete the development and evaluation phases with almost no rework.

I was continually amazed at how subject matter experts were able to sort course content. Because they became adept at filtering the ‘nice to know’ from the ‘need to know,’ we were able to optimize the design and development phase and reduce the time new learners spend in training.”
— Steve Muller, SMA Consulting

“It’s a VERY rigorous process that gathers great data and (perhaps best of all) is defensible from a business perspective.”
— Barb Koch, Raytheon Training Company

(Continued on back side)
“CADDI’s PACT Processes embody the fundamental principles of instructional technology. More importantly, the processes have a built-in project management scheme that makes it easy to use and easy to track and communicate progress. Finally, the processes also enable the customer to make key business decisions along the way, never assuming that training is the only answer. In short, the PACT Processes are ISD, project management, and ROI business decision-making all rolled into one rich, easy-to-use process.”

— John Stolter, Performance Innovations, Inc.

“We’ve been able to reuse the same basic course design for new functional areas. With the structure we’ve created, people without instructional design experience—process owners—can often edit the basic content within the curriculum training materials without having to do a redesign of the course or the curriculum. It saves significant time and money, produces a better product, and raises their comfort level.”

— Christie Westall, Hewlett Packard

“One of the most exciting and beneficial aspects of the PACT Process is the partnership that develops between the line Steering Teams and the training and development department. The scheduled process gate reviews drive the ongoing communications, instill line ownership of the results, and assure that training and development continues to focus on the right business objectives.”

— Randy Kohout, Bank America

“We have decided there is no possible way we could have been successful without the upfront planning we did with CADDI using the CAD process.”

— Cindy Oertwig, McLeodUSA

Pictures above: Lisa Alexander facilitates a group through embedding a K/S item into a T&D Module while Cathy Martin looks on.

Pictures above: Meg Travers (standing) leads Conrad Homer, Lisa Toth, and Barb Koch to determine, “Where does this K/S item go in the Path sequence?”

Pictures above: Brian Blecke lays out the T&D Path of Events with Tracy Sorrentino, Cathy Martin, Lisa Alexander, and another budding PACT Practitioner.